Setting Up A Dynamic Template in OpenEMM-2013

Jim Dutton – 03/13/2013, 04/22/2013

Note: the previous version of this document contained numerous errors. It should be discarded.

You may create the necessary dynamic (CM) HTML template using:

- external plain-text file editor
- external HTML (web page/document) editor
- import a “dummy” template and then modify it inside OpenEMM

Dynamic here refers to a template in the OpenEMM `Mailings/Content Manager/CM Templates` section. As with the static template document where I put all HTML code in the “template file”, that can also be done with dynamic templates. On the other hand, both the dynamic and static templates may be basic HTML skeletons (or canvas) with additional HTML formatting/code in the `Content (Module)`. This document will be based on the OpenEMM delivered “demo” dynamic template with several provided `Content Modules` and `Module Types`, and several supplied image files, and a 9-cell table layout template.

Another difference between the static template example and this dynamic template example is that the static example placed all of its template/canvas images in external (to OpenEMM GUI) files, whereas the dynamic uses `Picture Component` modules associated with the dynamic template to “upload” the images into the CM cms (content management system) database. This makes the images “internal” to the dynamic template, but not necessarily directly available to any other template (more on this later).

KEY CONCEPT: template and mailing association does not occur during mailing creation, as it does with static templates; the dynamic template is created, then the mailing is created, then the dynamic template is re-edited and the “Assign to Mailing” button (bottom right) is used to assign the template to a selected mailing

KEY CONCEPT: the existence of an Agnitas dynamic tag (“agnDYN”) in the dynamic template does NOT automatically created a Content module as they do in the static template method; however, Content module names must be the same as the agnDYN tag names; still, manual placement of content modules may be forced to differ from the agnDYN tags (more on this later)

KEY CONCEPT: dynamic text blocks can be either a single agnDYN tag with a terminating slash (“/”) or a “block” of agnDYN tags with intervening content (refer to the User manual); this is unique across all OpenEMM tags; forget the terminating slash, and the representative block may be unusable later on!

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Another major difference between static and dynamic templates, is that the dynamic method assumes that the template file is in an external zip archive which is then imported into the OpenEMM dynamic filter section (`New CM Template` upload). There is no template copy function as there is with static templates.

Note: the OpenEMM User Guide mentions a method to create an archive file to import a new dynamic template with images. There is no example and a simple attempt to follow these instructions did not work (03/13). The simplest thing to do is to archive just the template in a zip file and then import that.

KEY CONCEPT: linking, or associating, static images to a dynamic template after the template is imported, named, and saved, require knowing the name of the image files to be placed into the template. The User Manual states that using the Picture Component module to select Add and give the item “a name”. What it does not make clear is that “the name” must be the name of the image file itself. This is shown in the template source “agnIMAGE” tag:

```
<tr>
  <td><img src="[agnIMAGE name="Number-1.png"]" alt="Number-1.png"></td>
  <td>[agnDYN name="9cell-text-cm2"]</td>
  <td><img src="[agnIMAGE name="Number-2.png"]" alt="Number-2.png"></td>
</tr>
```

After the image file has been “imported”, the template HTML image tag SRC field may be changed to an internal, relative, URL something like:

```
<img src="/cms_image?fid=99" alt="Number-1.png">
```

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For the purposes of this document, the following image shows the basic (full sized) template layout which consists of 9 “blocks”:

Note that there are 5 “image blocks” and 4 “text blocks”. This is, of course, a purely hypothetical layout. Nevertheless, this will be used to “place” each “content block” in its desired position within the given template layout. Also note that while the text blocks are incidentally numbered, these numbers have no static reference to the final text “content blocks” that will be created. This is different from the “static template” situation where the template “content blocks” were “labeled” and “content modules” were created for content insertion that were named by the same labels.

Even though the template above suggests the intent of the content in every template defined “content position”, you will see later that during “mailing assembly time” that any “content module” can be placed into any “template content block position”. So the template layout is more of a suggestion.

KEY CONCEPT: It is up to the person creating the mailing to follow the template layout suggestion if they intend to make the end result look like the suggested template layout.

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For this document, the following is the dynamic template being used:

```
<html>
  <head>
    <meta content="text/html; charset=UTF-8" http-equiv="content-type">
    <meta content="BlueGriffon wysiwyg editor" name="generator">
    <title>Simple9cellTableTemplate</title>
  </head>
  <body>
    <table style="width: 100%;" border="1" cellpadding="60" cellspacing="30">
      <tbody>
        <tr>
          <td><img src="[agnIMAGE name=”Number-1.png”]" alt="Number-1.png"></td>
          <td>[agnDYN name="9cell-text-cm2"]</td>
          <td><img src="[agnIMAGE name=”Number-2.png”]" alt="Number-2.png"></td>
        </tr>
        <tr>
          <td><[agnDYN name="9cell-text-cm4"</td>
          <td><img src="[agnIMAGE name=”Number-3.png”]" alt="Number-3.png"></td>
          <td>[agnDYN name="9cell-text-cm6"]</td>
        </tr>
        <tr>
          <td><img src="[agnIMAGE name=”Number-4.png”]" alt="Number-4.png"></td>
          <td>[agnDYN name="9cell-text-cm8"]</td>
          <td><img src="[agnIMAGE name=”Number-5.png”]" alt="Number-5.png"></td>
        </tr>
      </tbody>
    </table>
  </body>
</html>
```

There could be more HTML/CSS formatting code used (alignment, font, et cetera), but this is meant to be a simple, “skeleton”, template to help demonstrate how things “hang together”. Don't let this example dissuade you from using more extensive HTML/CSS coding.

Also remember that Content Type modules, mini-templates for Content Modules, may also contain HTML/CSS coding, or not.

Note that using an equally distributed cell arrangement as used above may not work well with the text content blocks (or even the pictures if there are of different dimensions). Since there are no specific table row/cell dimensions used, adding text may cause the above table to be resized in a manner that will not be desirable. Again, this is just a simple template to illustrate HOW the basic setup process works, not how BEST to do things!

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Content Layout

You can think of OpenEMM dynamic templates and modules as a layered system:

- Base – document structure
  - Global – Template
  - Modular – Module Type
- Middle – Content Module
- Top - Mailing Content Module placement

At either, or both, of the Base levels, HTML/CSS overall document formatting can be defined. Either of these layers can have anywhere from very limited to very complex formatting. Formatting in the Modular level is intended to provide a specific structure for a particular planned kind, or type, of Content Module. Content Types can be used to create many Content Modules with the same structure. In the middle layer, formatting controls can be added to text blocks, but not to media blocks, and this formatting fits within the overall document formatting.

The dynamic template “system” is not dependent on a fixed definition of “content blocks” as is the static template “system”. One dynamically adds, removes, or excludes any predefined Content Modules at the Top layer which is not possible with the static template “system”.

Think of building, or designing, a new house:

- Dynamic Template = foundation, walls, floors, roof (overall structure)
- Content Modules = windows, lights, furniture, accessories, doors (usability units; specific “styles” or “brands” might have additional, independent, formatting controls)
- Content Type = basic structure for each kind of Content Module (specifications of usability units = dimensions, color, pattern, et cetera)
- Mailing Content Module placement = location of usability unit

Think also of “detail abstraction” with regards to where and how much HTML/CSS formatting is defined in any given layer. You can have as much detail at any layer as you want, or you can hide, or abstract, as much detail in one layer as you want - that will then be defined in a higher layer.

Another way to look at all of this is that you are going to build something using “Lego blocks”, but you first have to create (define) each “Lego block” to be used. At the same time, you are free to design new “Lego blocks” whenever needed.

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Basic Dynamic Template Creation Process

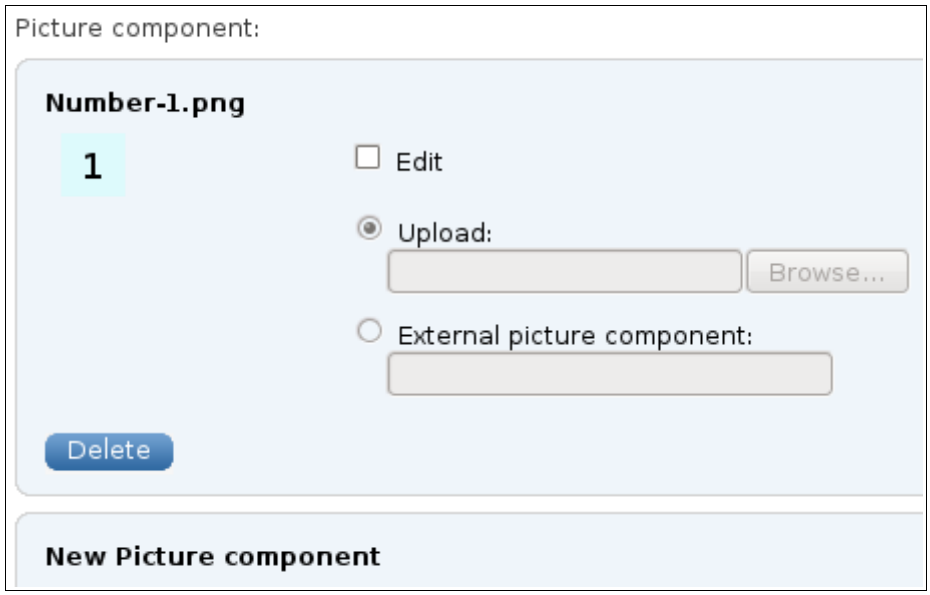
Please keep in mind that the following procedure is specific to the given template. While the actions are similar in all/most cases, don't forget to make any necessary changes for whatever template that YOU will be using.

1. Create the “template file” (HTML page/document, either with complete or skeleton layout)
2. Create a ZIP archive of the “template file” (eg; zip <filename>.zip <filename>
3. OpenEMM: `Content Manager/CM Templates/New CM template`
    1. Browse for template ZIP archive file
    2. Click on `CM Template: Upload`
    3. `New Template Name:` enter name for template
    4. Click on `Save`
4. OpenEMM: `Content Manager/CM Templates`
    1. Click “`Edit CM Template`” icon to open template preview for the new template
    2. Scroll down and click on the “`Edit`” button to go into template editor mode
    3. For each image element, click on the “`New Picture Component`” button
        1. Enter a“name” for the image in the `Name` field (which must match the value given in the template “agnIMAGE name” field; if this field is left blank then it will be filled in with the image “filename”, which must then be the same value as the agnIMAGE tag value)

        2. Browse for the local image file (eg; “/home/openemm/local_images”, if web browsing directly from the OpenEMM host, or wherever on your local computer)

        3. Click on the “`Save`” button

4. A new `Picture Component` with a view of the image and its "name" should appear



4. Repeat the above steps for each embedded image file

5. After adding/importing all of the necessary images, scroll to the bottom right and click on the `CM Template: Save` button to save the changes

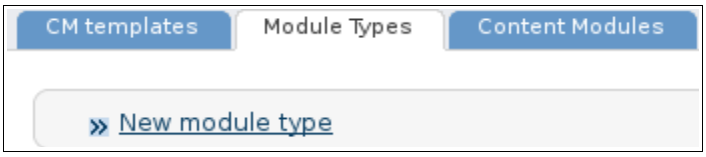
6. The following image is a reduced version of the, saved, 9-block template to make it easier to see all of the "content blocks" defined within the template; all of the picture components are now attached to and visible in the dynamic template as shown in a preview image of the template; again note that any text content added that results in an area larger than any other cell, will cause the overall layout to be altered, though the block placement will remain fixed

1	[agnDYN name="9cell-text-cm2"/]	2
[agnDYN name="9cell-text-cm4"/]	3	[agnDYN name="9cell-text-cm6"/]
4	[agnDYN name="9cell-text-cm8"/]	5

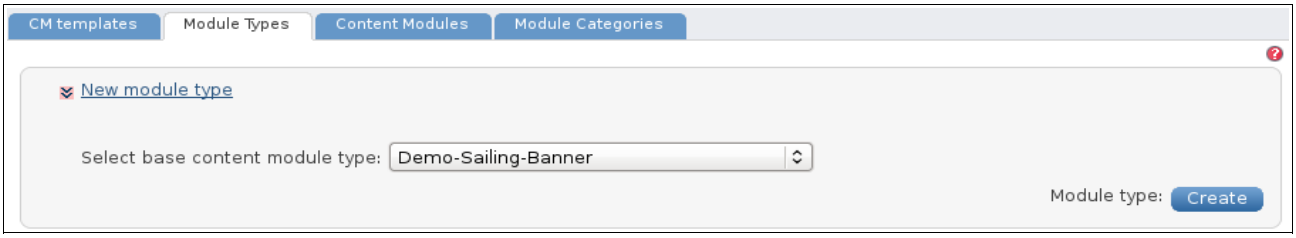
5. OpenEMM `Module Types`

1. Next click on the `Module Types` tab to start creating the HTML/CSS structure for different kinds of Content Modules; remember, that the formatting controls can be anywhere from nothing to very complex; the template being used here has only minimal placement HTML with no CSS, so any desired text (Content) Module formatting will have to come from the Module Type configuration (HTML/CSS coding); of course, each Module Type can be different, but every Content Module derived from a given Content Type will have the same HTML/CSS coding/structure

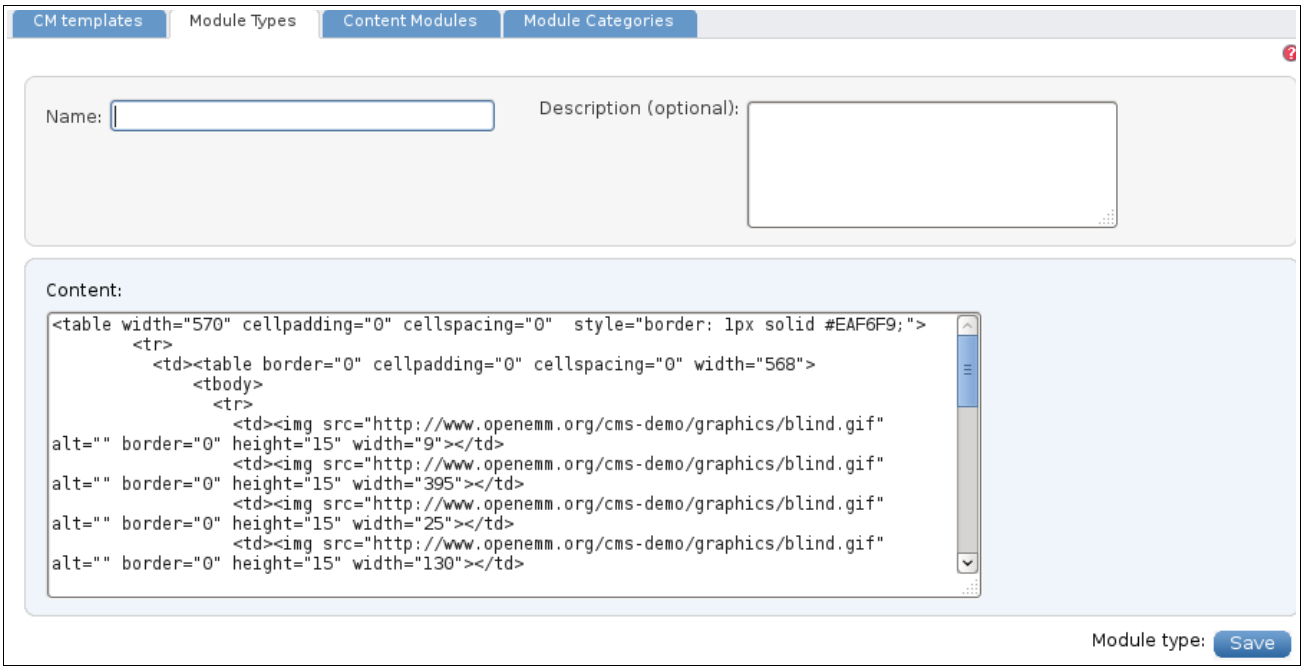
2. Then expand, click on, the "New module type" link



3. A new option will appear where you must select some other kind of module type; it doesn't really matter WHAT – it could even be an empty module type; you will alter the selected Type following this; Click on the "`Create`" button to initiate a new module type (P.S. It would be a good idea to go through this process once to create an "empty" Type)



4. A new editing section opens up where you will NOW name the new Content Type, describe it, and actually edit the "content" of the new Type (modifying, deleting, adding to whatever is already there)

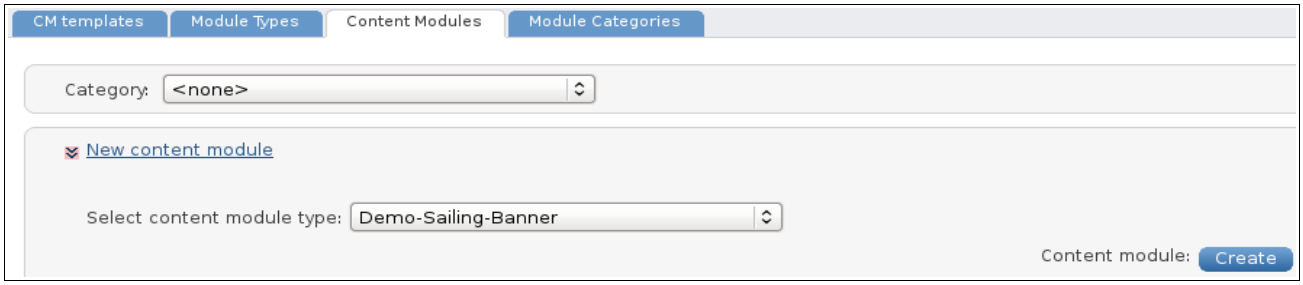


5. Click on the "`Save`" button to save the new Module Type; one more time – remember that a "Module Type" is a mini-template for a "Content Module"; if you were working on a larger scale template which used a lot more HTML/CSS formatting code, some of that code could, but doesn't necessarily have to, be moved into a Content Type

6. Repeat this action for every Type that is needed; remember, that you are defining the particular formatting and layout, or internal canvas, for a generic kind of Content Module that will use this Type, later; also remember that Types can be used by different Content Modules, so you don't necessarily need to create a Content Type for every Content Module unless they are all going to have different formatting

6. OpenEMM `Content Module`

   1. Click on the "`Content Module`" tab and then expand the "`New content module`" link

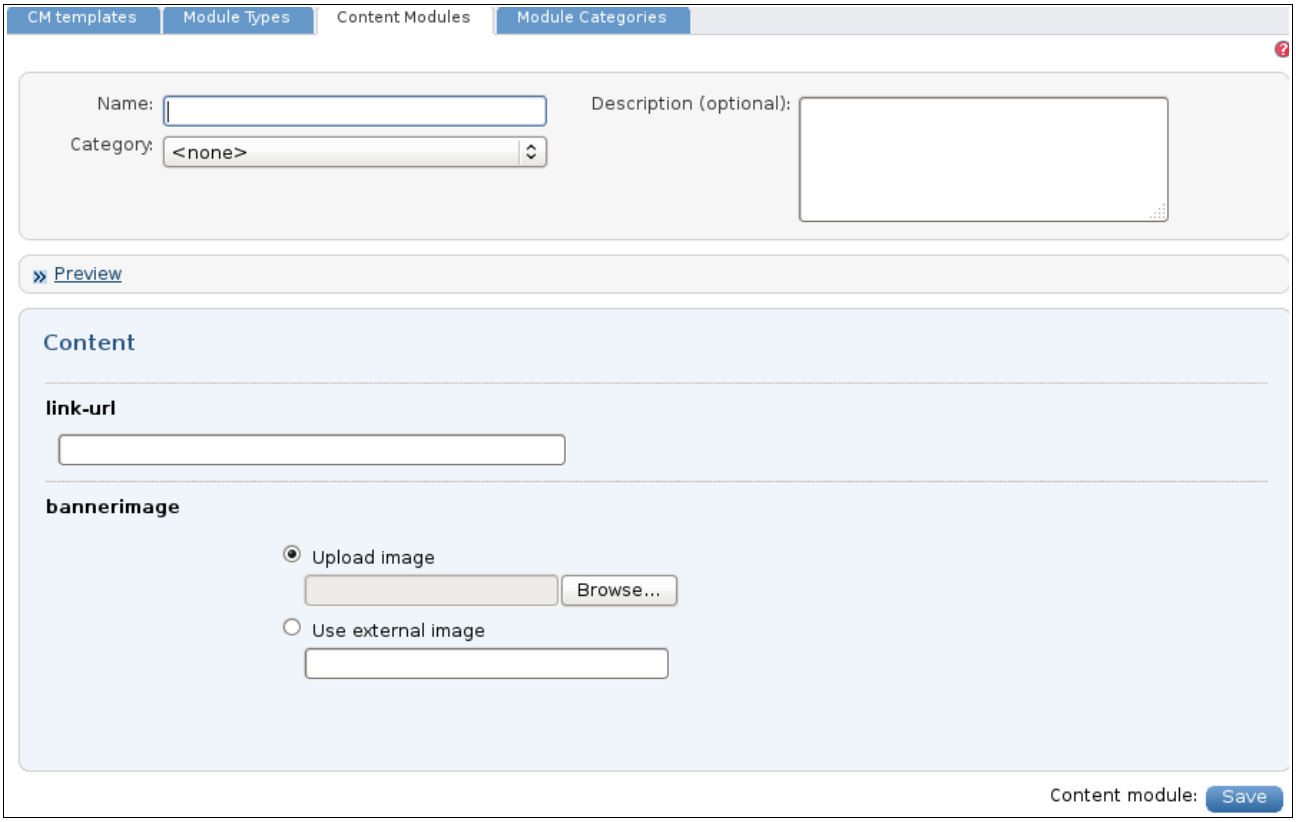


   2. Select the desired `Content Type` to be used to set the basic formatting for the new `Content Module`

   3. Click on the "`Create`" button to initiate a new Content Module editing window; here you will NAME and describe the new Module; (module) category selection is optional – see OpenEMM User Manual for more information); note that what is presented is the formatted version of the `Module Type`; so whatever Agnitas content tags that were used in the `Module Type` will create appropriate editing fields/controls (similar to what is seen in the following screen shot where the Content Type chosen used only two Agnitas tags: "agnLINK" and "agnIMAGE")

4. Wherever there is an “entry” field, select or enter the desired or required data (eg; URL, URL/link title/description, image file filename, content text);

   KEY CONCEPT: what is entered and selected in this Content Module will then become the (formatted) “content” included in the mailing wherever this particular Content Module is placed



5. Insert images, or text content, as indicated by the specific control fields, and click on the “Save” button to save everything for this Content Module

6. Preview the filled-in Content Module to verify its appearance and expected content

   1. When the Content Module is saved, a “thumbnail” image of its contents are placed in the Preview column; some content may not be visible yet

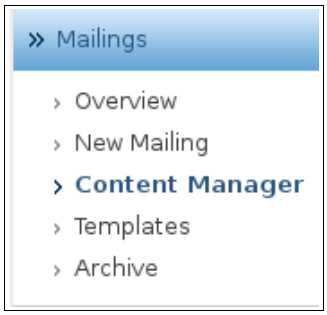
2. Left-click on the Preview "thumbnail" and an expanded preview image will be displayed; all of the content should now be visible (you may have to scroll the "preview image box")

3. Click on the "<<hide preview" link above the preview image to return to the preview thumbnail

4. If there are any adjustments that need to be made, then click on the "edit" button (mini-text-page with pen) to re-edit and save Module

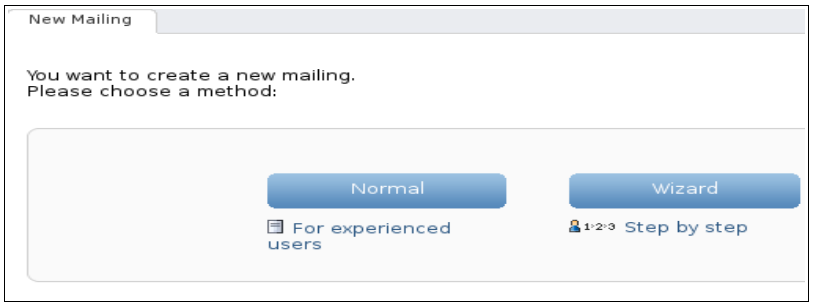
7. Repeat the above actions for every Content Module needed for the particular mailing where it will be used

8. Create/define a "mailing" to be used to gather all of the content components and later, send it out ; select "`Mailings/New Mailing`" from the menu

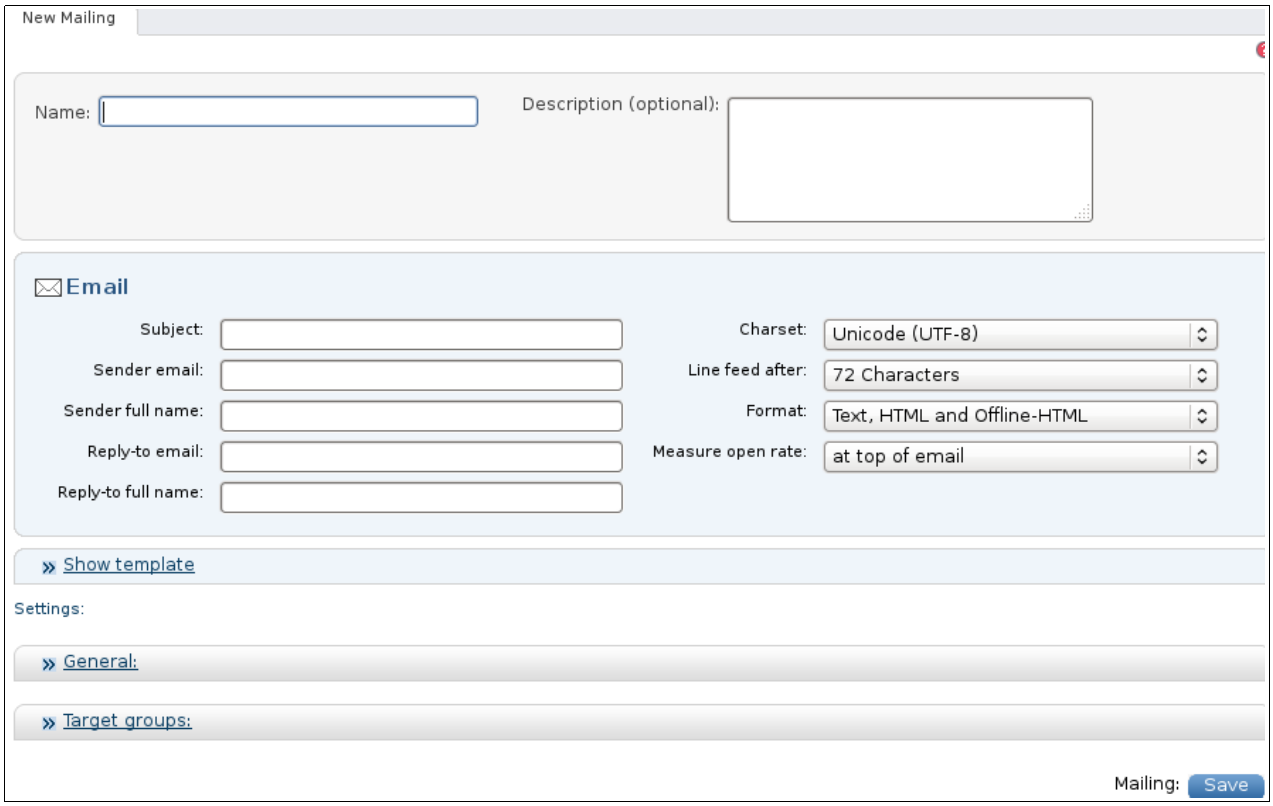


7. An option window will appear where you can choose to use a Wizard method or Normal method to create the mailing; we will use the Normal method as we have already done the work necessary to prepare and review the basic content components

   The Wizard Method may help someone new to this process, but really all that is needed at this point is the basic mailing configuration, which is what the Normal method provides



8. There are four sub-sections to the New Mailing edit module

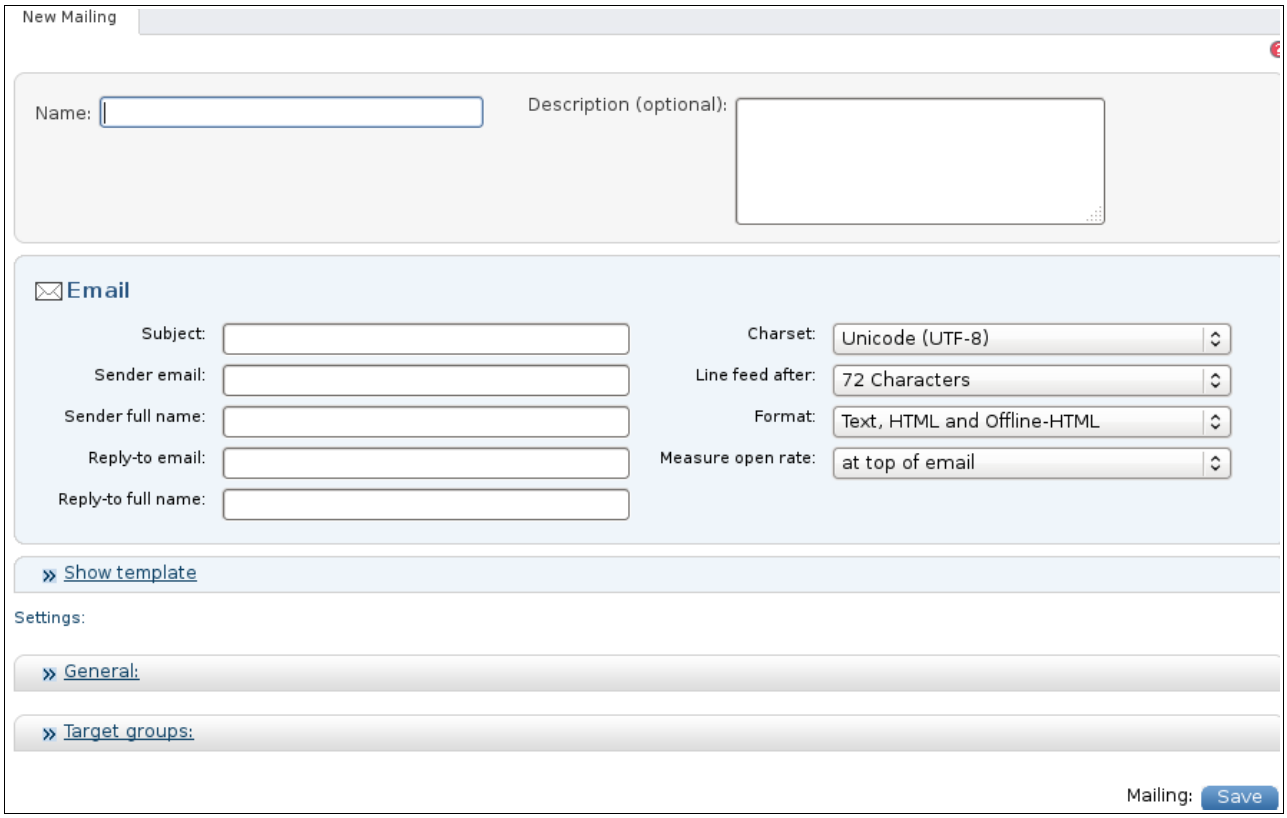


1. Enter a reasonable name for this mailing, something that will make it easy to distiguish from other “mailings”; it might be good to include some unique data item such as a date, sequence count, color, day of the week, et cetera; however, realize that the display of ALL mailings will only show the first 20-30 characters of the Name, so put the more meaningful part in those first characters

2. Enter a reasonable description of this mailing, perhaps expanding upon its Name, perhaps explaining why it is being used or for whom; it should be good enough for someone else to get a high-level view, or grasp, of the purpose and maybe something of its content – without having to look through (or preview) the mailing (or its components)

3. The “E-mail” sub-section is where you will verify and/or select four characteristics of this mailing (Charset, Line Feed after, Format, and Measure open rate); the above example should be good enough for most mailings – see the User Manual for more information

4. In the other five E-mail are the “identity items” for this mailing; the first three are required



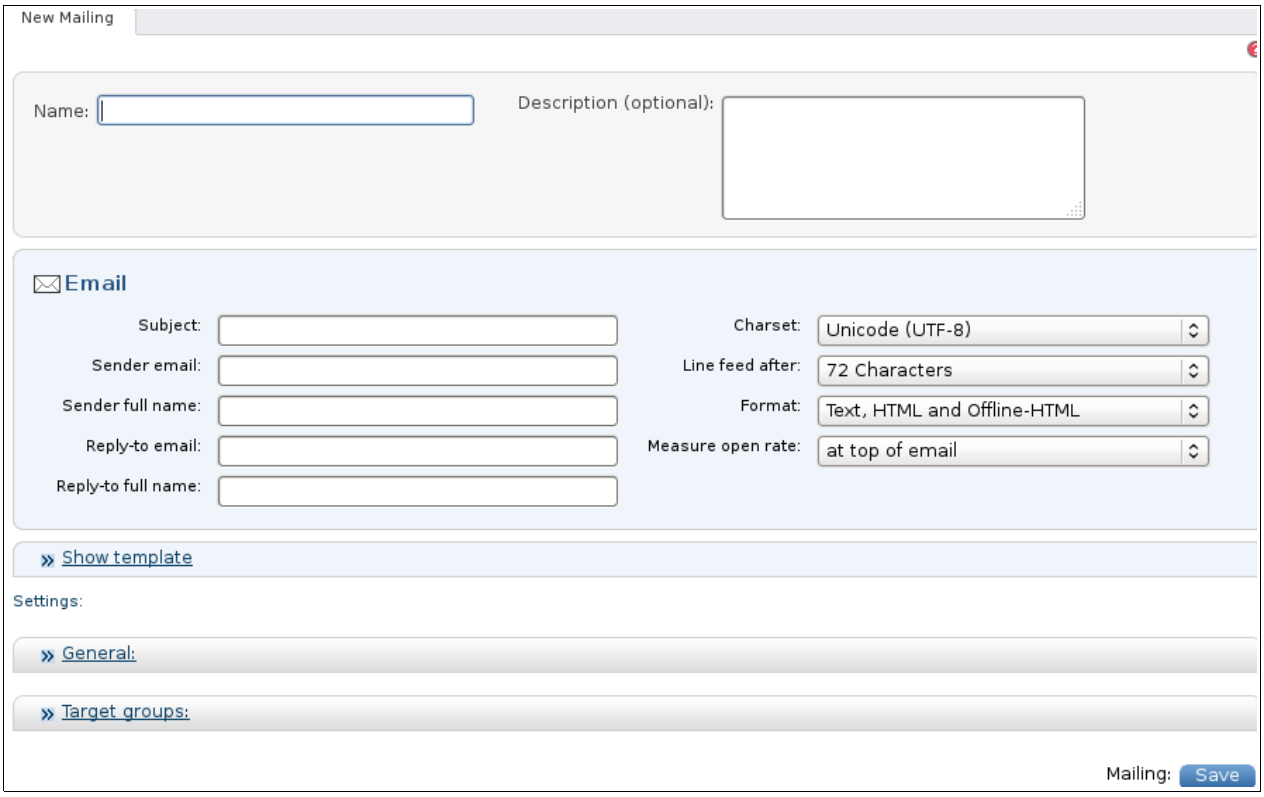
1. Subject: good enough for client to understand what this mailing is all about; try to avoid typical spam format/words

2. Sender email: e-mail address from the “sender” which will appear in the mailing “From:” header

3. Sender full name of the “sender” which will also appear in the mailing “From:” header

4. A lot of comments can be made about using valid, invalid, or valid but not really the real, physical, “sender” in the two Sender fields; some reasons are very good whereas others may be perceived as misinformation or intentional obscurity which might lead to negative results; one should also not use a valid Sender name and e-mail address that they have no right to use; if a proper name and address could be used, but might lead to confusion (eg; parent company information), then think carefully about what is used

5. Since we are working with a (Content Manager) dynamic template, there will be nothing associated with or displayed under the “Show template” sub-section; you can certainly click on the link and it will expand to show nothing (or just another blank line)



6. The last sub-section, “Settings”, is where you connect, or assign, the recipients to this mailing; it is made up of two sub-sub-secions: “General” and “Target groups”

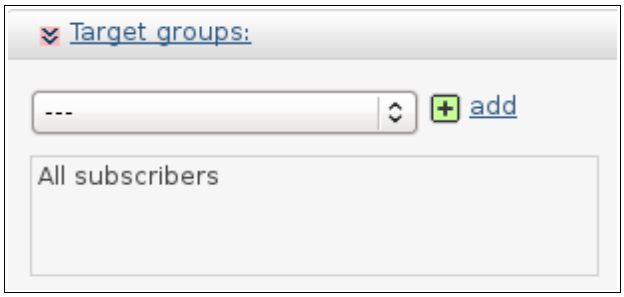
7. The User Manual mentions how both sub-sub-sections together make the final determination as to who will receive the mailing; that is, it may be possible to override or subset the list of recipients grouped together by the same mailing list assignement in their OpenEMM user profiles; how this control does or might work will not be discussed here

8. The General Settings sub-sub section is required as this is where you will link this “mailing” to a given (predefined) “mailing list”; those recipients whose OpenEMM user profile has selected, or enabled, the selected “Maling list” will now be automatically designated as recipients for this mailing

1. Template: will display “No Template” as dynamic templates are not shown; only static templates would appear here
2. Mailing list: select the proper predefined mailing list for this mailing
3. Archive: optional as to whether you want to keep a local, internal to OpenEMM, copy of the mailing which could be used for various reasons but also takes up more database space
4. Mailing type: for all but special Date or Action based mailings, this should be left as “Normal mailing”

   KEY CONCEPT: only user recipients whose OpenEMM profile contains the selected mailing list, has enabled that mailing list, AND has the mailing list definition in the profile set to “Normal mailing” will receive THIS mailing (if the “Mailing type” is set to “Normal mailing”)

9. The last sub-sub section, “Target groups”, will not be discussed here as I have not had enough practical experience in using it in conjuction with selected “Mailing lists” to offer any useful comments; refer to the User Manual for more information

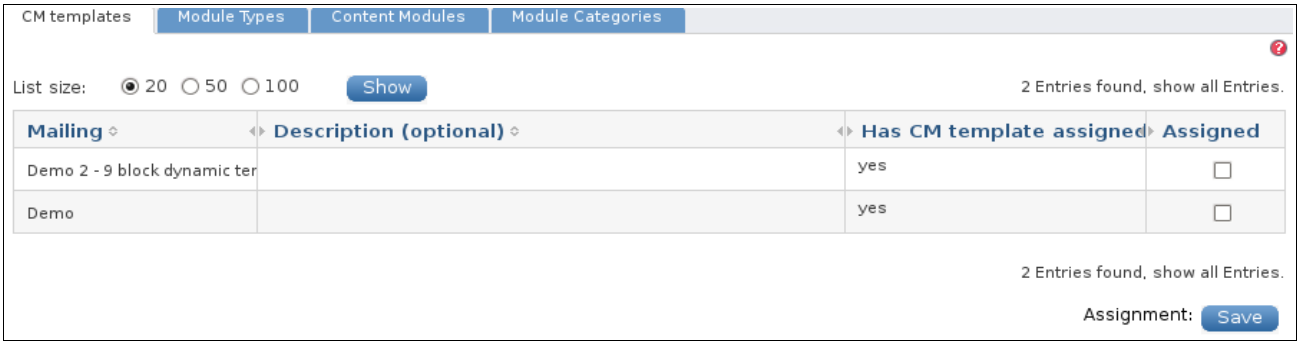


9. Click on the “Mailing: Save” button (bottom right) to save the new Mailing configuration; this should cause the “Mailings Overview” window to appear with the newly defined mailing included in the “Mailing” column

10. Now you need to attach, or associate, the dynamic template to/with the newly created “mailing”

    1. Go to “Mailings/Content Manager/CM Templates” and find the desired dymanic template
    2. Scroll to the right (if necessary) and click on the “edit icon” button
    3. Scroll down again to the bottom right until you find the following action buttons

    4. Click on the “Assign to mailing” button; this will open up a modified version of the “Mailings/Overview” window with two different columns at the right side: “Has CM template [been] assigned” and “Assigned”



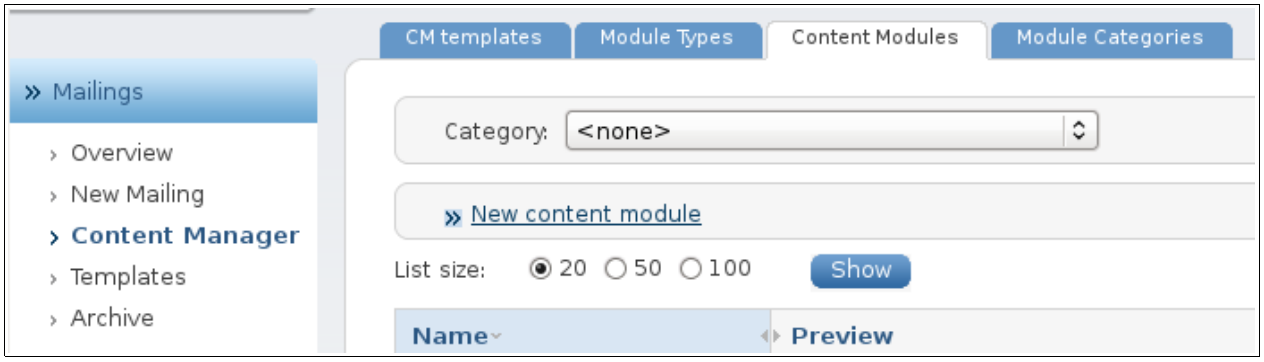
    5. For the Mailing that the selected dynamic template will be assigned to, click on/in the “Assigned” box and then click on the “Assignment: Save” button at the bottom right

       KEY CONCEPT: this is how a dynamic template is assigned to a mailing which is different than for static templates where they are assigned to a mailing via the New Mailing/Settings/General/Template field; also remember that the dynamic template will NOT appear in the “Mailings/Mailing/Settings/General/Template” field

       KEY CONCEPT: to unassign a dynamic template from a mailing, follow the same steps above but Unselect the “Assigned” template

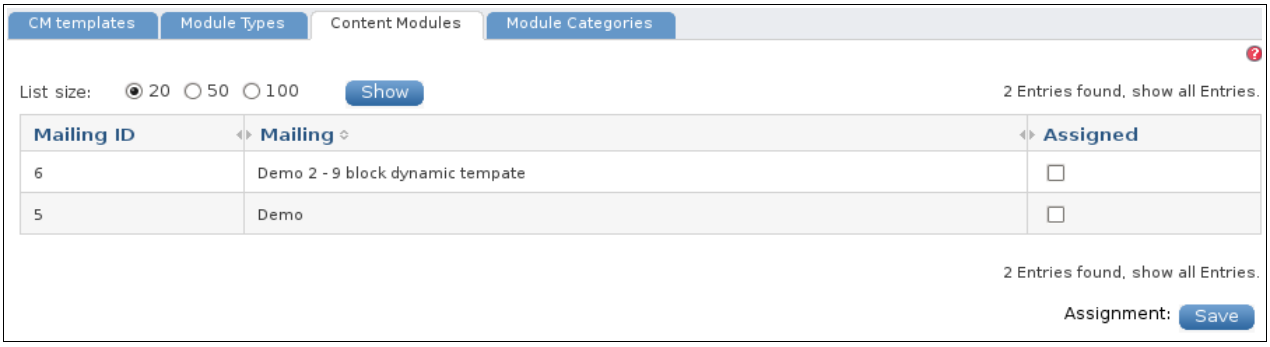
11. Lastly, at this point, we need to assign/associate the required Content Modules with the mailing (note that this is different than from the way that static templates and content modules are linked together)

    1. Select “Mailings/Content Manager/Content Modules”; you don't need to worry about which template will be used at this point



    2. For each Content Module to be used with the newly created mailing,
        1. Find each Module and click on the “edit” icon to its (far) right
        2. Now scroll all of the way down and to the right to find the action buttons and click on the “Assign to mailing” button

    3. A modified overview screen should appear such as follows; find the Mailing to assign the Content Module to and click in/on the “Assigned” box, and then click on the “Assignment: Save” button at the bottom right



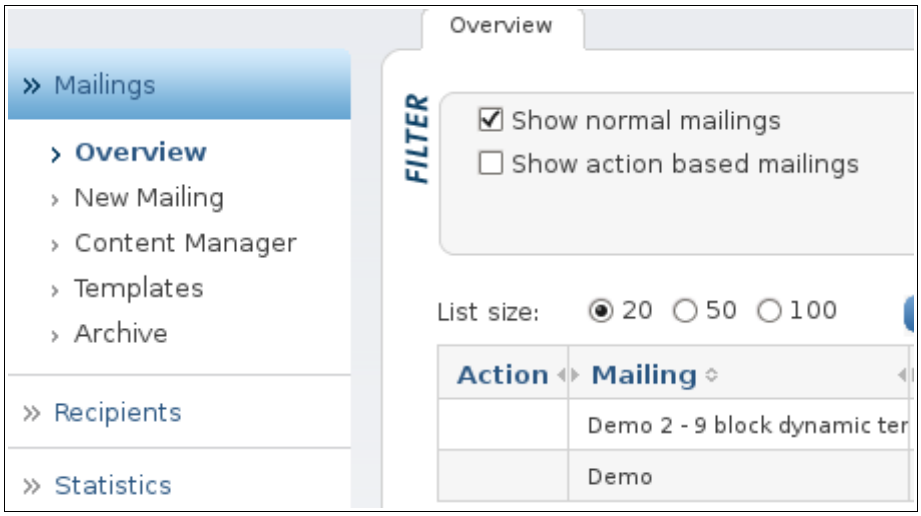
    4. Use the same method above to UNassign a Content Module from a mailing

3. For each of the required Content Modules, repeat the above select-and-assign process

   KEY CONCEPT: each module should be "assigned" in the same order that they appear in the template – this should alleviate manual adjustment later

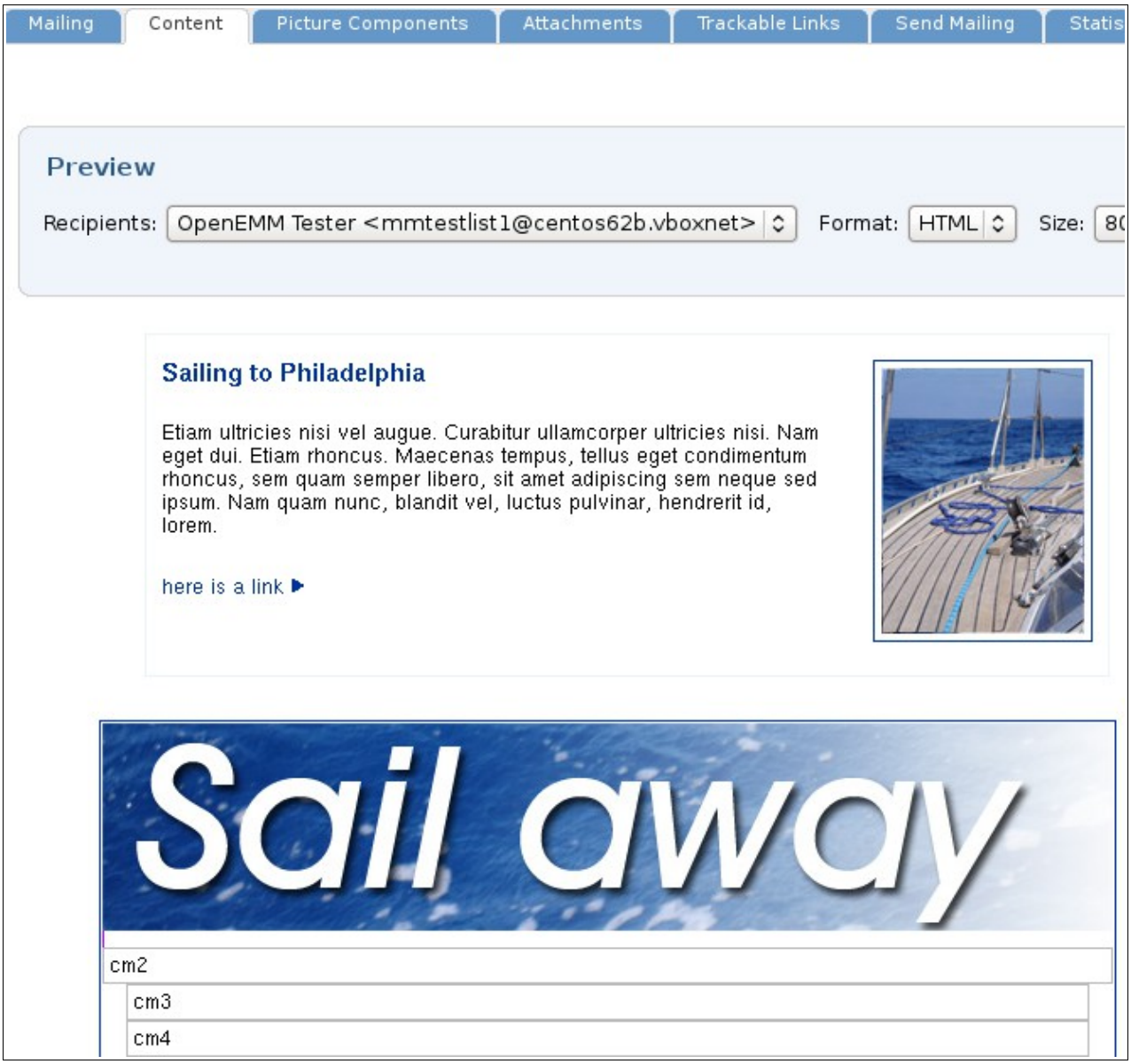
   KEY CONCEPT: this is how dynamic Content Modules are assigned to a mailing using a dynamic template; this is different than what is done with static templates where the Content Modules are predefined when the static template is saved; also, dynamic structures are single components whereas static structures are multiple combined components (eg; all Content modules together)

4. To verify that all of the required Content Modules are now assigned to the new mailing, to go "Mailings/Overview/Mailing" and click on the newly created Mailing



5. Click on the "Content" tab; this should open up a preview window with a Preview section (where recipients are identified) and a "template preview" section

   Note that the next image uses the optional OpenEMM demonstration template and content (as it was ready before I created my actual content for my 9cell template).



6. If all of the required Content Modules have been successfully assigned to the new mailing, then there should be no dynamic template Agnitas tag names displayed (the above example had more tags than content); all of the assigned Content Modules should be displayed

7. If this is NOT true, then go back and review whether all Content Modules were assigned, and if so – do they all contain content

8. You could continue with checking the Picture Components, but the images should all appear within the Content Preview; it might be easier, however, to review a lot of pictures with the Picture Components just to see if everything expected is listed

12. TAKE A BREAK – no, seriously – TAKE A BREAK; all of the basic components have been defined and all of the desired content has been filled in; there are still a few “finishing touches” to be considered plus Content Module placement, mailing review, and sending out the mailing

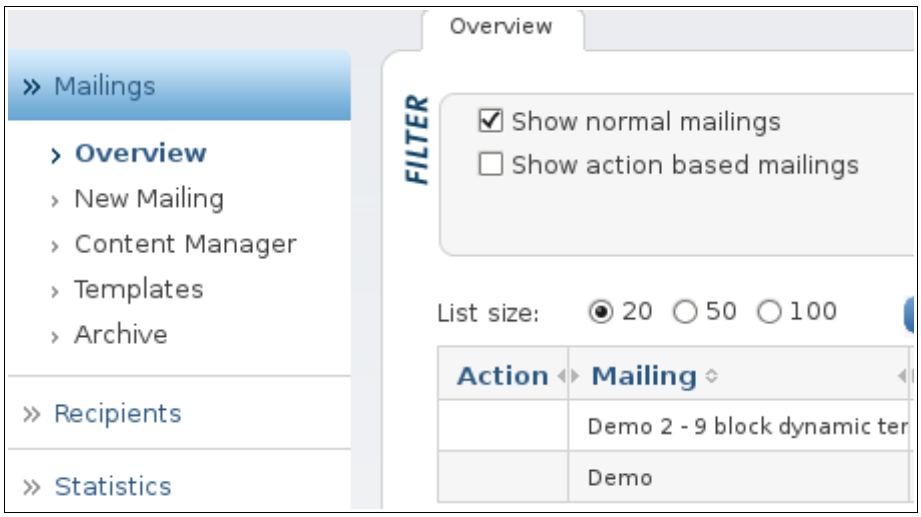
13. You should make sure that you have a sufficient backup plan to protect your work; if you haven't backed anything up recently, then do so NOW (or better yet – before you go on break); you should have multiple layers of redundancy: one “online” for immediate access and at least one “offline” for longer period recovery or history, or disaster recovery (which could be nothing more than your own workstation)

Setting Up A Dynamic Template in OpenEMM-2013

Jim Dutton – 03/13/2013, 04/22/2013

Finishing up mailing configuration and review mailing

1. Log back in to OpenEMM and find the (new) mailing that you just completed configuring and filling in its content ("Mailings/Overview/Mailing" column)



2. Click on the mailing name and a new editor window will open up with multiple actions tabs along the top

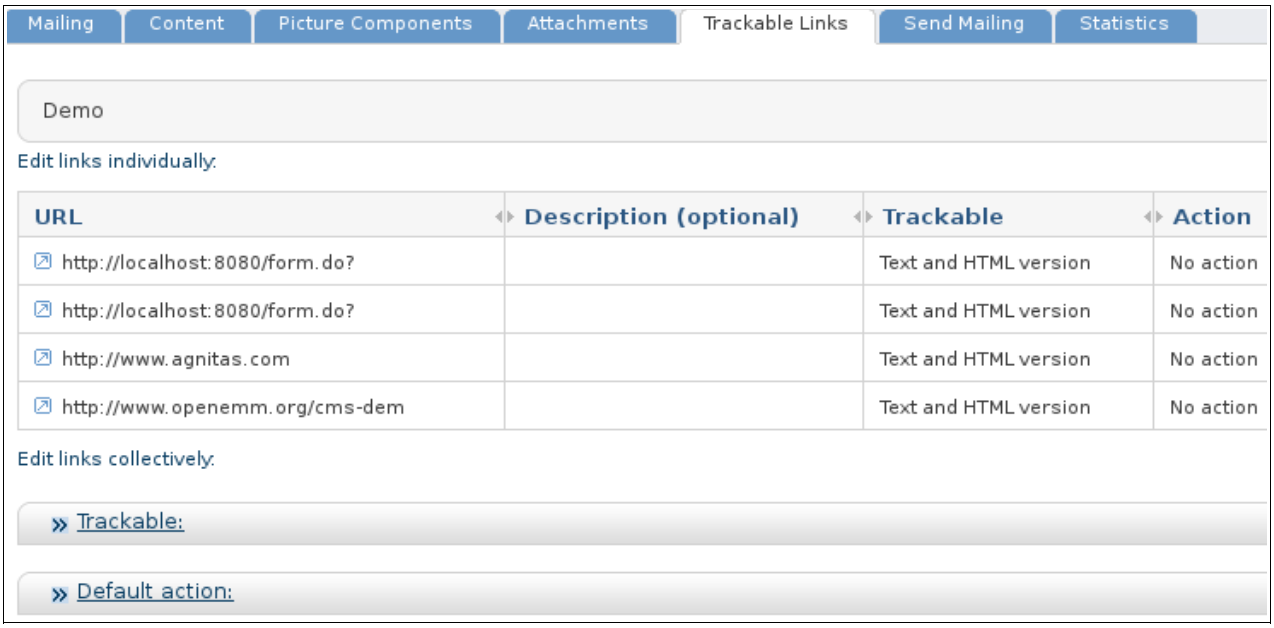
3. If there is an external file that needs to be included as an attachment (note: OpenEMM only provides for 2MB or smaller attachments by default), then click on the "Attachments" tab (there can be multiple attachments)

4. If there are any embedded/external URLs in the mailing, then these will need a tweak to prevent them from being turned into "bran mush"

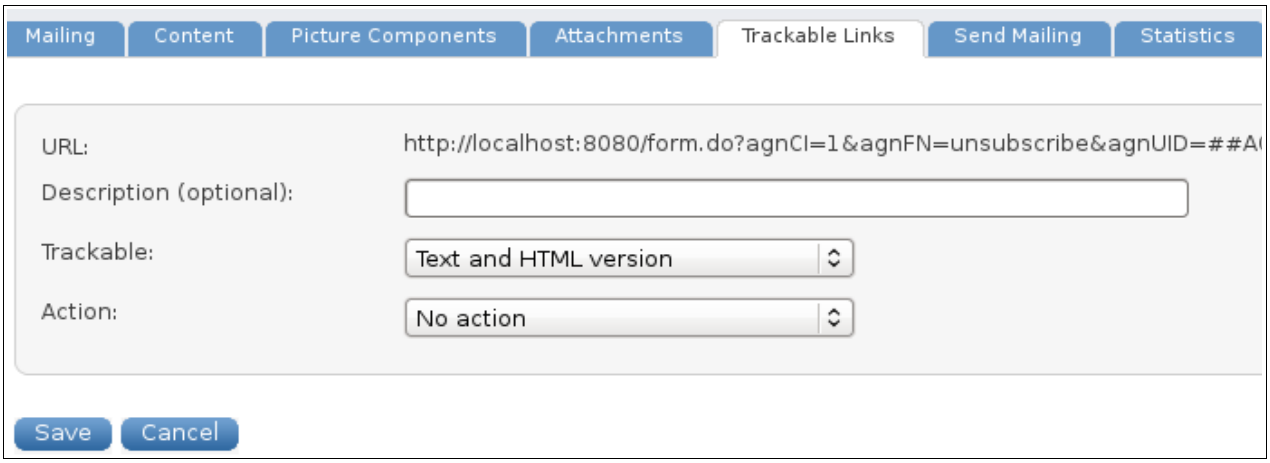
    1. Click on the "Trackable Links" tab

    2. A new window will open up with the name of the mailing at the top (though not labeled) and one entry for each embedded URL (if there are any); look at the "Trackable" column; if it shows anything other than "not trackable" for an embedded/external URL, then the Trackable setting for that URL needs to be changed

3. For each embbed URL to change, click on the URL text, NOT the little icon to its left (which will open up the link in a new browser window)



4. Click on the “Trackable” multi-option selector and select the “not trackable” option; then click on the “Save” button to save the change



5. When all of the embedded/external URLs (even those for “w3.org”, or other places where CSS/JS files may come from) have been changed, then they should ALL show “not trackable” back in the “Trackable links” window; URL's that are not “protected” in this way will be converted to an internal OpenEMM URL that attempts to point back to the content on the OpenEMM server; obviously, remote content won't be there

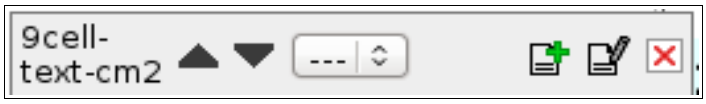
5. Now we are ready to finalize the placement of the Content Modules (which we previewed earlier); technically, this could have been done earlier when all of the Content Modules had been assigned to the mailing, but sometimes that order may not be followed and the placements need to be adjusted

   KEY CONCEPT: dynamic Content Modules are not limited to the position of the associated Agnitas tag in the template; once "assigned" they can be moved during the "mailing" final setup, which may be confusing if there were not assigned in "template order" to begin with; static templates and content modules are tied directly together and placement is "fixed"

6. Go to "Mailings/Overview" and select the new mailing

7. Click on the "Content" tab to open up the dynamic Content "editor"

   1. First of all, note that each Content block has a "handle" associated with it where you can perform several operations; this handle only appears when you mouse-over the displayed content block; it contains six operators:



      1. Agnitas tag name associated with current template placement

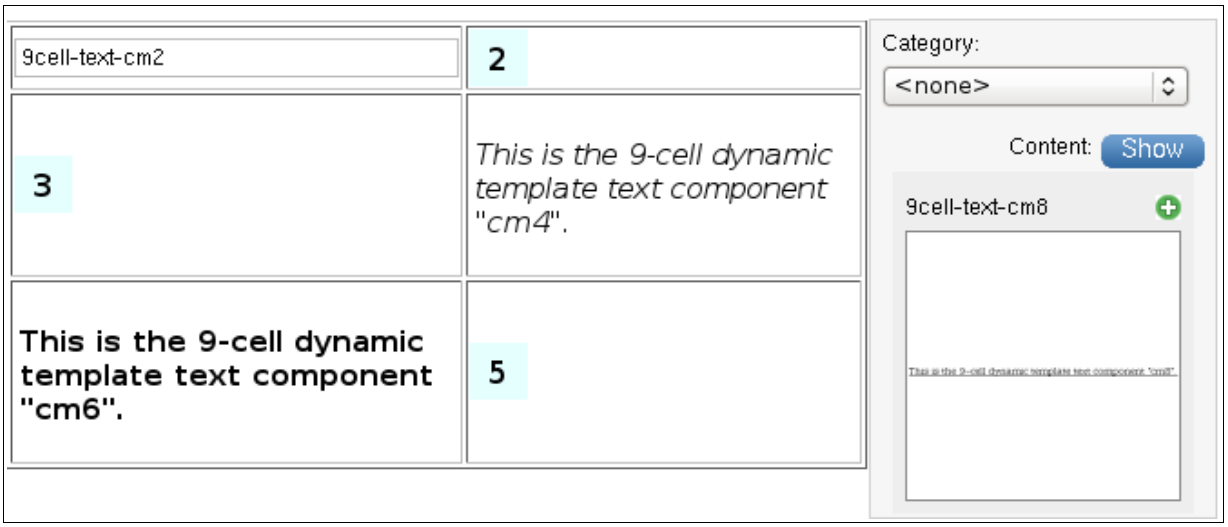
      2. Move content block up or down one template content tag/location

      3. Unknown

      4. Jump out of the current Content editor and enter a "New Content Module" editor where an entirely new Content module can be created, independent of any other Content module – including the one that you came from

      5. Jump out of the current Content editor and open the dynamic Content Modules section with the current Content block open in edit mode

6. Delete current Content block from mailing preview and “store” it in a “call list” to the right where it can be reinserted into the mailing preview – this does NOT delete the Content module from the CM Content Modules list/area, it does, however, unassign the Content block to the current Mailing



KEY CONCEPT: if you bounce back and forth between the mailing Content window and other OpenEMM operational windows WITHOUT first clicking on the “Content: Save” button at the bottom right, then ALL changes will be lost!

2. If you delete a content block from the Content preview, it will be put into the “call list” block with a green plus-sign to the right of its module name; clicking on the “add” (plus-sign) reinserts the specific Content module into the Content Preview pane (in the first available slot), and reassigns it to the associated Mailing; you canNOT save a module in the “call list” and have it preserved there if you Save the Content and leave the Preview screen; it will be gone and unassigned

3. Deleting a content block from the preview pane may also reorder the remaining assigned content blocks

4. There are three methods for ordering the individual Content Modules

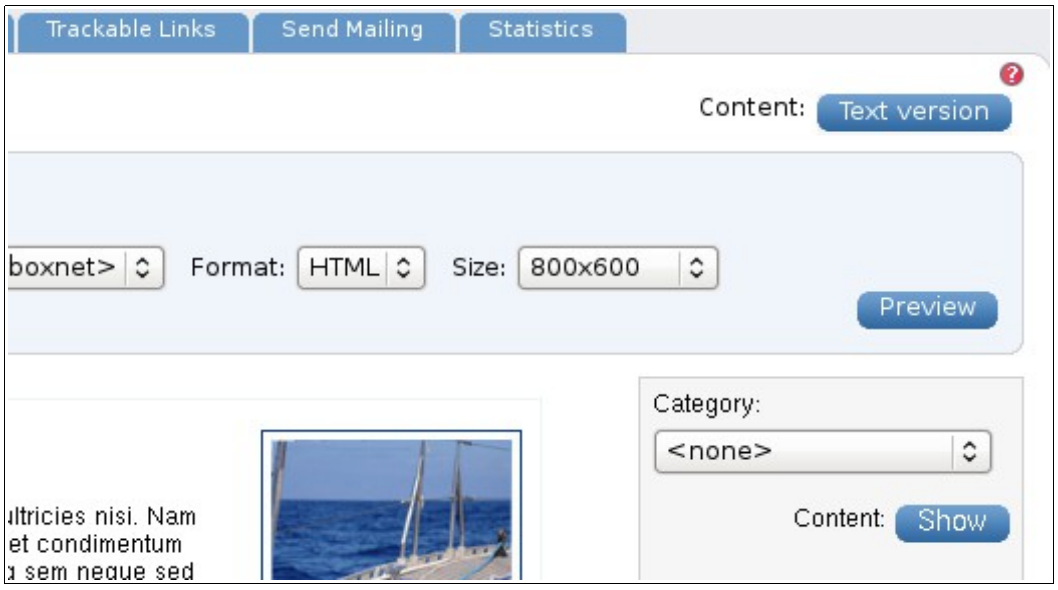
    1. Leave them all in the Content Preview pane and use the up/down operator in the Content "handle" to move each Content block up or down (one "template position"); the name of the Agnitas position tag will change; repeat until all Content blocks are ordered as desired; note: this can be very confusing as it may not be possible to see all of the content blocks at once, or it may wind up being like the "Tower of Hanoi" game (multiple pieces to move but ony three pegs)

    2. You can "delete" all of the Content blocks from the Content Preview pane and work with them from the "call list" pane; each Content block re-inserted goes into the next available template position so you need to select your blocks in the desired order of placement

    3. You can create all of the Content Modules and then assign them to the mailing in the order in which they need to appear; this is the best and safest method to use

5. Click on "Content: Save" to save all of the changes or they will all be lost when you leave the Content Preview screen! You have been warned!!

6. To verify the final (hopefully) results of all of the Content module placements, click on the “Preview” button near the top right of the screen; only static images and assigned Content Modules will be displayed (eg; any unassigned template positions will not be seen); note that when you go into “full bliss” preview mode, you will also be switched from the Content tab/window to the “Send Mailing” tab/window (the Content Preview button is really a link to the “Send Mailing” Preview button, so make sure that you do a Save beforehand as you will need to return to the Content window to make any more changes)



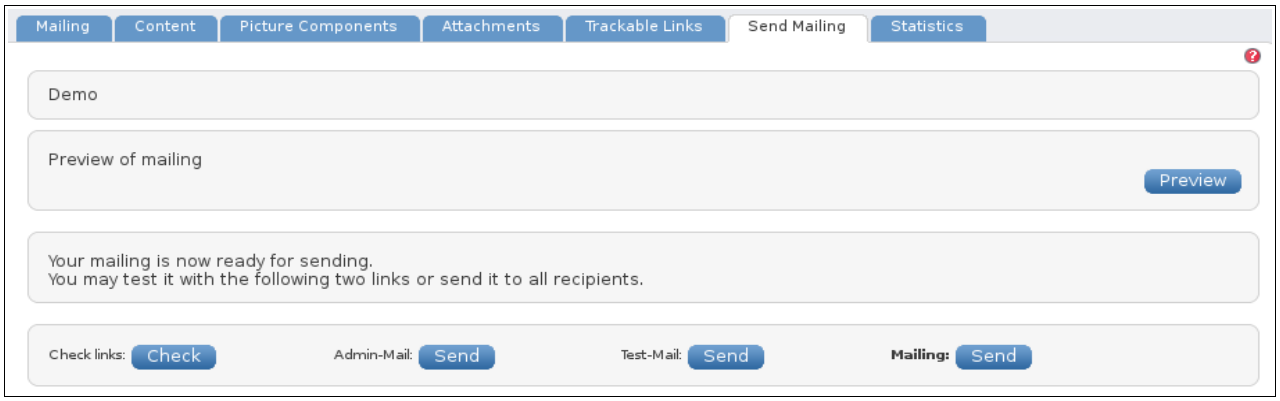
Setting Up A Dynamic Template in OpenEMM-2013

Jim Dutton – 03/13/2013, 04/22/2013

Sending Out Mailings

1. When all of the work in creating templates, mailings, and modules are completed, it is time to test the mailing and if that is satisfactory – send the mailing out "live".

2. Go to Openemm:Mailings/Mailing/<new mailing>/Send Mailing
3. Depending on the combination of "mailing type" and recipient "mailing type", there will be three or four action buttons that will appear; there is also the "Preview" button to allow you to, once more, preview the entire mailing content



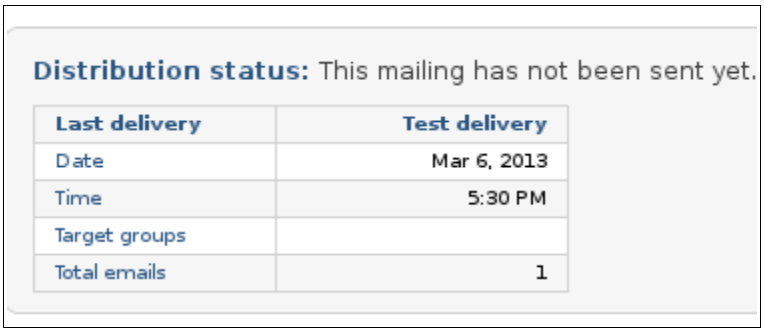
4. The two test "Send" buttons ("Admin-mail" and "Test-Mail") are used to test the correctness and completeness of the mailing content and delivery using well-known, and limited, recipients (either those marked as "Adminstrator" or as "Test recipient" in their mailing list setting in the profile

    1. You should use the "Admin-Mail" option first to what is expected to be a very small recipient list – perhaps even just one (perhaps "you"); this will test all of the OpenEMM functionality in generating and transmitting the selected mailing; it will also test the final appearance when the Administrator user opens and views the mailing; this should ALWAYS be used for EVERY new mailing! If there are any mistakes, this will be the safest way to find them before a major foul up can occur

    2. The "Test-Mail" delivery would most likely be used to test the mailing (and delivery) to a larger recipient population that should include some that are representative of the known or expected real recipient set (eg; different ISPs, different e-mail clients, different experience levels, et cetera); it may include more "fellow workers" or "outsiders"

3. Only when you (and whomever needs to approve new mailings) are truly satisfied with the test results, should you then send out the mailing "live" to all targeted recipients using the "Mailings: Send" button; see the User Manual for any possibilities of canceling this action once it has been initiated (you, or someone else, may also be able to control the e-mail transmission process outside of OpenEMM, but that may not be quick enough to stop everything); this is the "final straw", the "real delivery", and you better hope that all of the testing was accurate

4. After OpenEMM has transmitted the selected mailing, a "Distribution Statics" window will appear below the action buttons with a count of the number of e-mails that were generated by OpenEMM, and when OpenEMM finished delivery of them



5. There will be different statistics boxes for the Test and real deliveries

Setting Up A Dynamic Template in OpenEMM-2013

Jim Dutton – 03/13/2013, 04/22/2013

General Comments

1. This document has attempted to show all of the steps necessary to create and deliver a dynamically formed mailing. It should be noted, however, that this is just one way to achieve this goal. The basic steps will be the same, but you may choose to do them in a different order. That is fine – have at it.

2. With the flexibility of OpenEMM dynamic mailings also comes complexity. Not just in the larger number of steps required versus doing things with the static template method, but also in the fact that the Content Modules in the dynamic method can become more of mini-HTML-documents than their static counterparts. Both dynamic and static Content modules may contain as little or as much HTML/CSS/Javascript coding as is desired or necessary. However, dynamic Content modules be assigned to ANY mailing whereas the static modules are tied to only one template, which can be linked to different mailings – but the static Content modules themselves cannot be assigned to different mailings. This can be a boon or a bane, depending on how self-complete the dynamic Content Module is, and how well it fits into any and all dynamic templates. For example, an advanced template designer may be familiar with HTML frames, iframes, relative or absolute positions, and 3rd-axis (positioning) used to hide or show static or dynamically created content. They most certainly will also be familiar with "floats" (creating, organizing, and cancelling). Then there are the various image galleries, some with fancy "lightboxes", animated menus, et cetera, et cetera, et cetera. They may also be quite fluent in Javascript and now how to perform many functions and tricks with it. So now a "template designer" can design an "e-mail" that looks and acts just like a fancy "web page". One needs to REALLY think carefully about this, though. There are many considerations to take into account such as

    - limits on e-mail (document) sizes
    - browser/e-mail client quirks
    - usefullness or uselessness of fancy features
    - ease or frustration of recipient in viewing the intended content
    - time-to-completion for very complex deliveries versus simpler ones
    - potential complexity to be able to revise the template/module design

3. A dynamic Content Module can be designed to "stand on its own", and that may work very well for certain kinds of intended formatting (every inquiry form has the same basic format, et cetera). It also may create problems if its internal formatting competes or defeats that found in the dynamic template. In many cases, the "KISS" principle is more appropriate.

4. OpenEMM action mails, forms, recipient management, statistics (on a larger scale) and Target Groups have not been addressed in this document; please see the User Manual for more information about them

5. If you have large-scale, external, Sendmail/Listserv mailing lists with clients who may appreciate and be able to make use of graphical e-mail, then OpenEMM can be used as a “Content Mangement System” with recipeint management handled externally (see separate document about this possiblity); note that there may be specific restrictions with these facilities

6. A wise dynamic template designer will use Agnitas tags whose names are sequentially numbered so that the Content designer/provider will have an easier time of assigning each Content Module to the correct place within the template layout (“canvas”)

7. Not much has been mentioned about “uploading” images to OpenEMM; when this process is used, the image “file” gets stored in the OpenEMM database and is only accessible by its file name or a properly formatted URL; this may not make it (easily) reusable in other templates as you can't browse the database for images via the OpenEMM interface, though you can go back through previous Mailing/Picture Compoents and find the requisite URL (or filename); It might be easier to make a copy of a mailing to reuse DB stored image files; this may also may make deleting images somewhat more difficult; it comes down to experience with using OpenEMM and managing its database as to whether this is a preferred method over using static image files on OpenEMM disk space (which obviously requires access to the OpenEMM application host and proper file/directory permissions)

8. One of the main benefits of OpenEMM IS its “content management system” functionality; templates, content modules, images are centrally located and in many cases, can be reused; this can be a very valuable asset

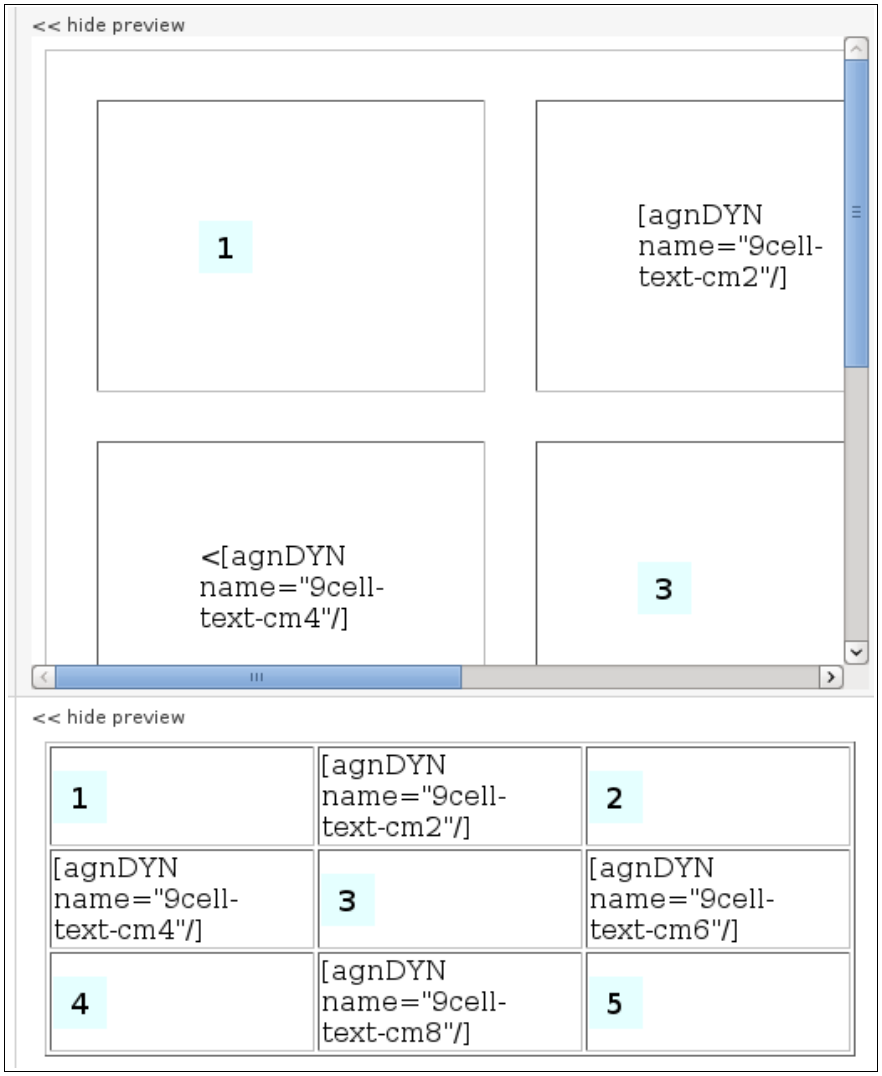
9. Nothing has been mentioned about the ability to copy certain OpenEMM components to be able to create new, yet similar, components; this can be a very useful feature as the new component is given a name “Copy of ...” so there is little possibility of accidently overwriting or deleting the original component; it also provides a complete working component that may save a lot of time in further development for the new component; learn how and where to use this feature!

Setting Up A Dynamic Template in OpenEMM-2013

Jim Dutton – 03/13/2013, 04/22/2013

Return to and completion of the 9-cell template example

The “full size” template is shown in the top portion of the following screen shot. The “reduced size” 9-cell template is shown in the bottom portion. Since the reduced size is easier to display, it will be used for the remainder of this discussion. It has the exact, same, layout structure as the “full size” version (picture elements in cells 1,3,5,7, and 9; text elements in the intervening cells). As mentioned before, actual pictures, and text, entered into their respective “cells”, may cause the size of the layout to change, but the basic structure will be retained.



Setting Up A Dynamic Template in OpenEMM-2013

Jim Dutton – 03/13/2013, 04/22/2013

The idea of this particular template was to present the content in a specific spatial orientation so that there would be a notable shape that it would appear as. So it is the shape of the content layout that was the definitive goal for the template structure, not strictly the order of the text and/or images. Their order could be intentionally sequential (or linear) from top-left to right-bottom, but the dynamic template is attempting to create a shape that has a recognizable, perhaps, theme or pattern. The primary idea here was that the images had fixed locations as did the text. Their specific contents could be changed (from use to use) or move to another similar content location, but the “display shape” would remain as is.

The remainder of this discussion will focus on “placing” the various components into the template structure. The significance, purpose, or order of the component content is not relevant at this point. Keep in mind, however, that there may also be a requirement for “order” for the images and text.

The OpenEMM dynamic template demonstration entry uses a simple top-down linear layout, which is fine. The principle of dynamic content placement is the same, no matter what the “display shape” of the template layout is. It is important that the individual placing the content have an understanding of the intended appearance of the final result, unless there is no concern for appearance and it is only the order of the content that is important.

So, as a review – before placing dynamic template content,

- The dynamic template will have been designed and imported into OpenEMM-CMS
- Image files will be “uploaded” to the OpenEMM-CMS
- Content “blocks” will be manually created for each text “block” (content module names should include some kind of sequencing string to make it easier to manage the individual “blocks”)
- The “mailing” configuration will be completed that will use the particular dynamic template

Now it is time to place the “content blocks”. In the 9-cell example, pictures were statically defined and assigned to their respective positions as part of the template definition. It would have been possible to have all nine cells defined as “open blocks” and then move the pictures and text content modules into the proper order to achieve the 9-cell picture/text layout design. To make this demonstration easier, the pictures were defined in the template so all that has be to inserted are the text content modules. At the same time, this method assures a fixed layout design.

Setting Up A Dynamic Template in OpenEMM-2013

Jim Dutton – 03/13/2013, 04/22/2013

We will be “inserting” the text content modules in numerical order. That is: “9cell-text-cm2”, then “9cell-text-cm4”, “9cell-text-cm6”, and finally “9cell-text-cm8”. Note, that the content module names are not directly related to the template dynamic “block” tag names (as they are with static templates). They could both be entirely, arbitrarily, different. As suggested before, however, the content module names here included the template dynamic tag name so as to assist in the proper placement order. Also remember that each dynamic content module can have its own HTML/CSS coding/format, or they can rely on whatever coding/format is defined by the dynamic template.

1. In `Mailings/Content Manager/Content Modules`, find the text modules to be placed in the desired dynamic template
2. In the sequence (top to bottom, left to right)
    1. Click the “edit” icon for the module
    2. Click on the “Assign to mailing” button
    3. Select the desired dynamic template to assign the module to (click in the appropriate “Assigned” box)
    4. Click on the “Assignment: Save” button to perform the module assignment
3. Repeat the above steps until all desired text modules have been assigned

Now to illustrate that content blocks can be positioned differently than their name and Agnitas tag association, we are going to do two things:

- First – move blocks in their existing assigned locations to another location

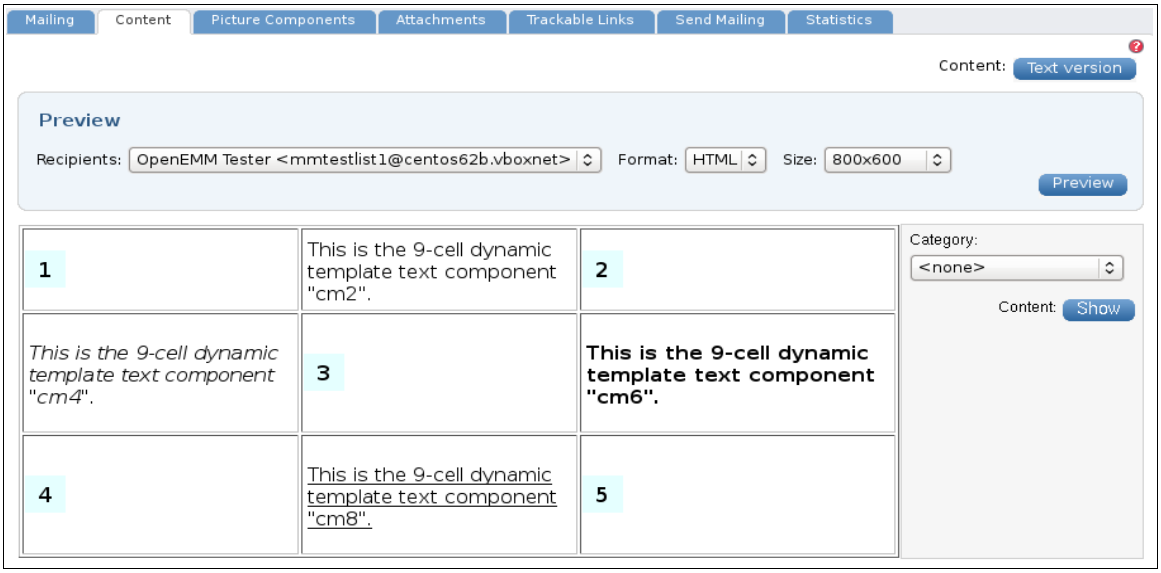
- Second - “delete” blocks (and put them in the “call list” pane) and then reorder them by the order of re-insertion from the “call list” pane

Setting Up A Dynamic Template in OpenEMM-2013

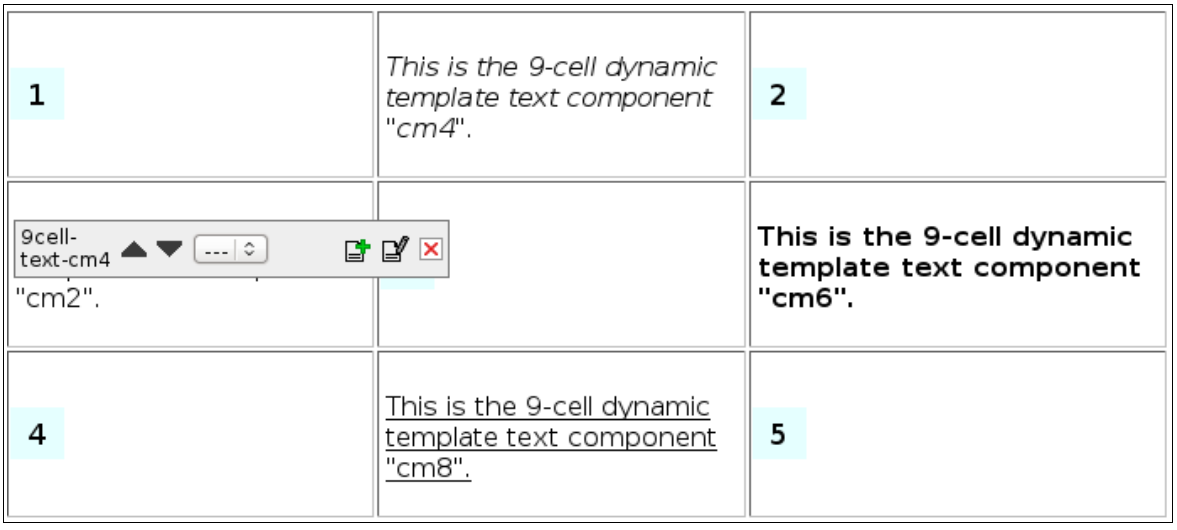
Jim Dutton – 03/13/2013, 04/22/2013

Move Blocks Within Content Preview Pane

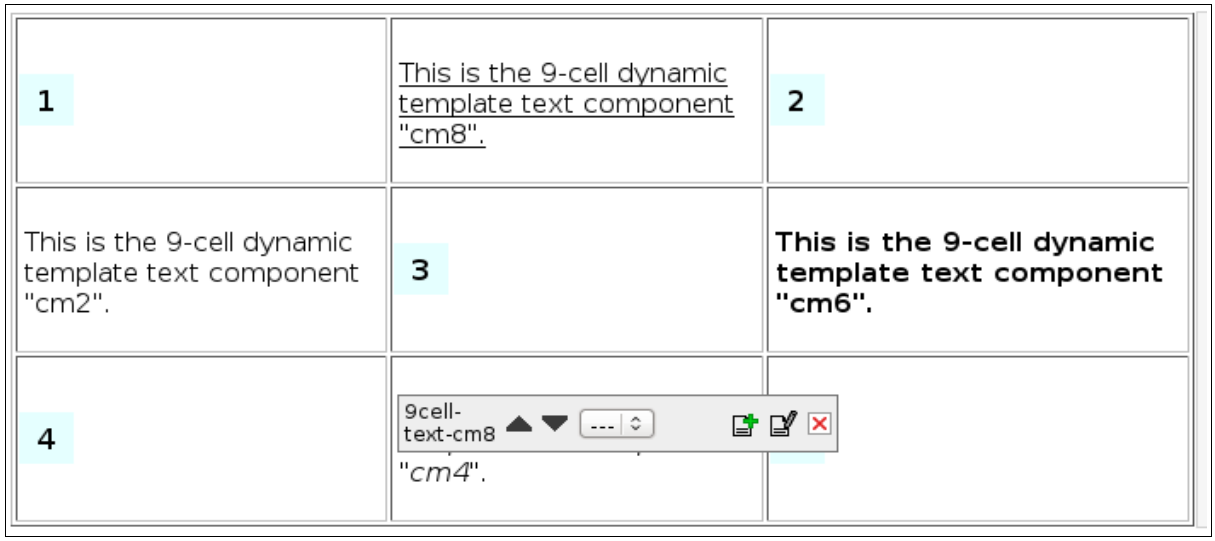
Let's start out with the fully assigned image and text components. The “call list” pane is empty. The text components were assigned in the order as their template Agnitas tags indicated (which corresponds to their cell number, left-to-right, top-to-bottom).



If we mouse over “9cell-text-cm2” and click on the “down” move arrow, “cm2” has exchanged places with “cm4”; these two blocks are no longer in the same position as their template tags were named; hence “dynamic placement”



If we now click on the “down” move arrow over “cm8”, it will exchange places with (template table cell location) “cm2” (which contained content originally in cell location “cm4”):



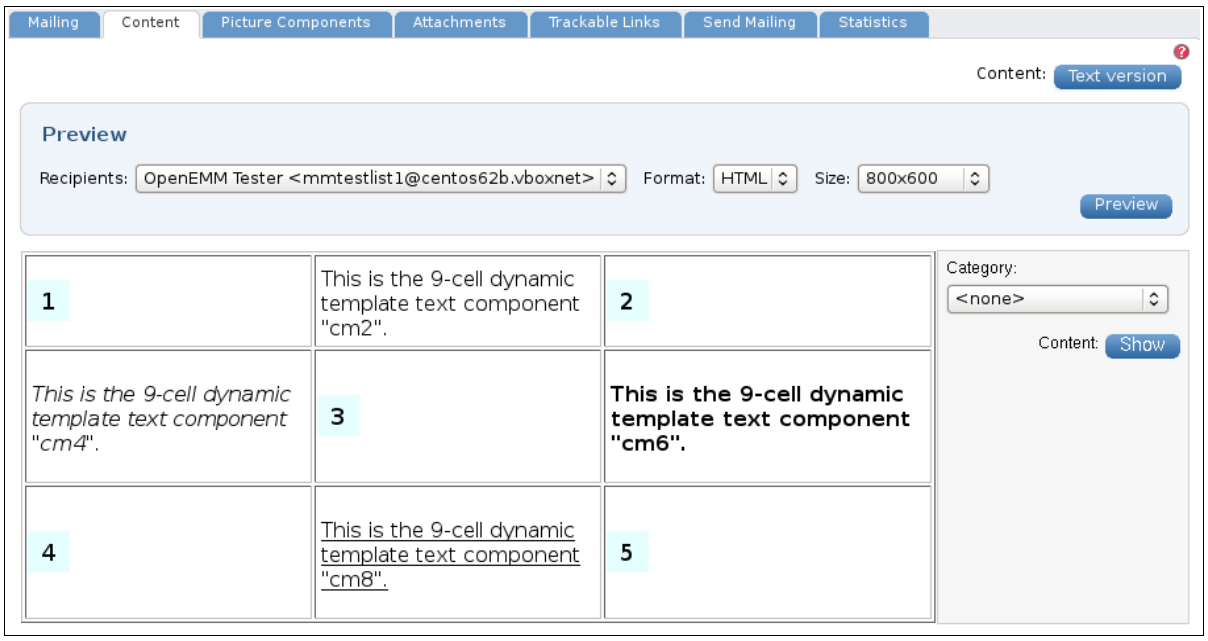
So – here we have shown how to dynamically re-arrange content blocks once they have been assigned to a mailing. Hopefully, you won't have to do very much of this, if any at all.

Setting Up A Dynamic Template in OpenEMM-2013

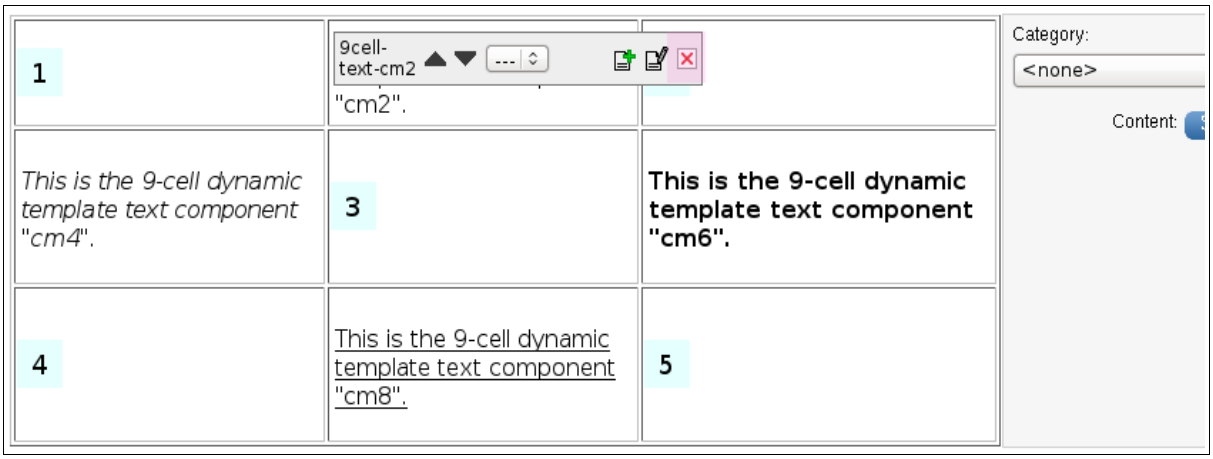
Jim Dutton – 03/13/2013, 04/22/2013

Move Blocks Within Content Preview Pane by using “call list” pane

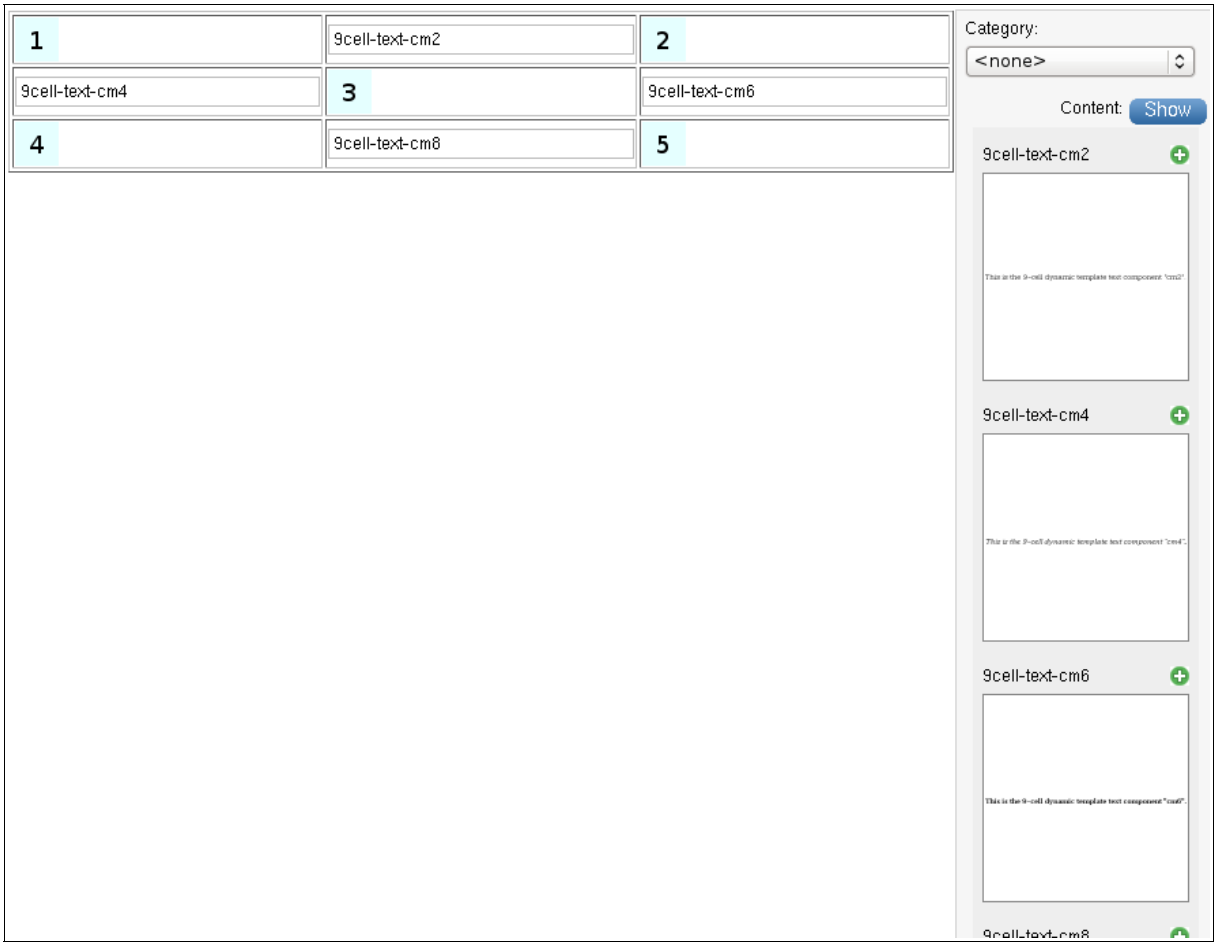
Start out with all content blocks assigned to their (assumed) template locations (as before):



Now we will “delete” all of the text content blocks and they will be temporarily stored in the “call list” pane:



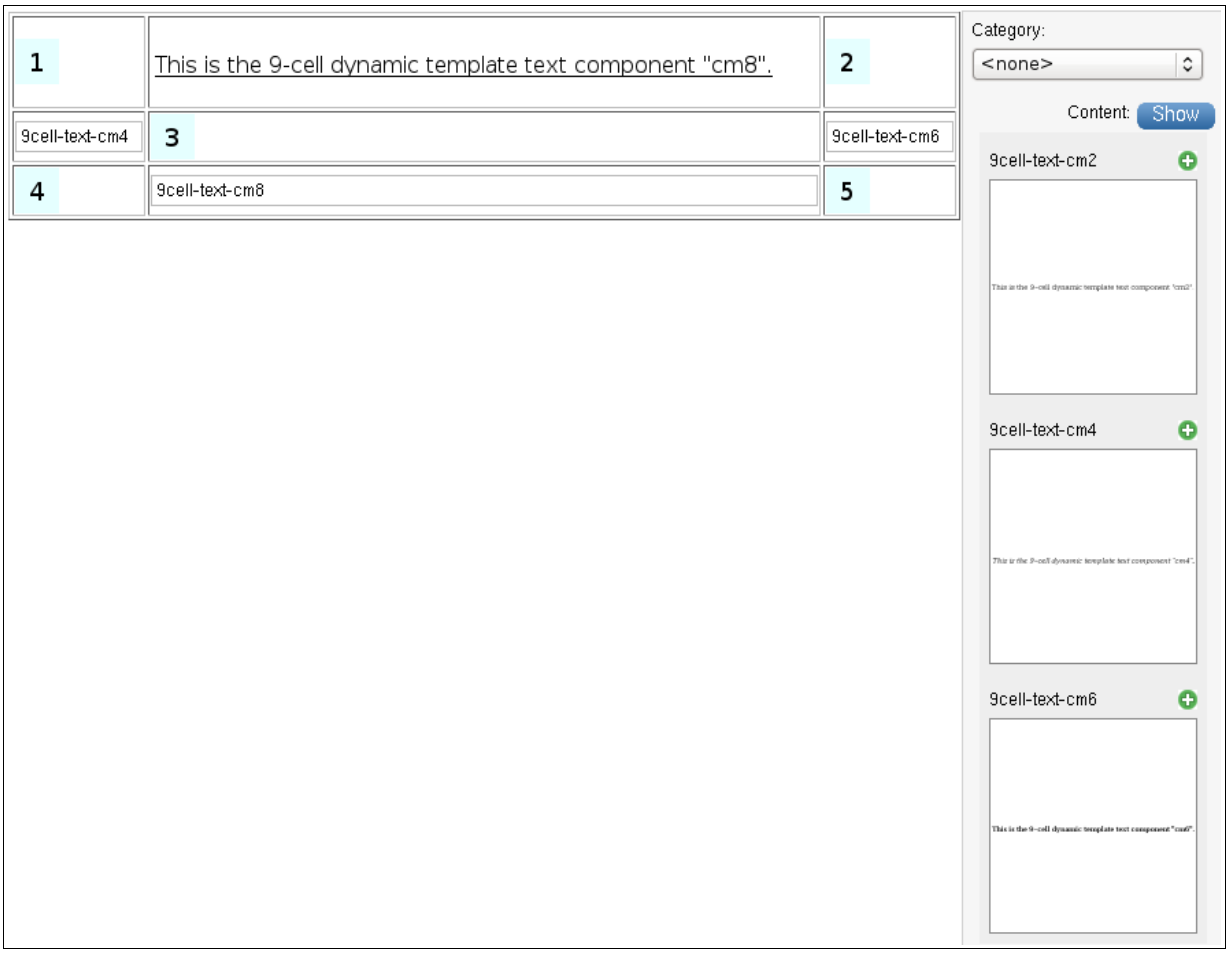
Here all of the “deleted” content blocks are now in the “call list” pane (not all of the blocks are visible, and they were not deleted “in order” though they appear to be stored in name/number order):



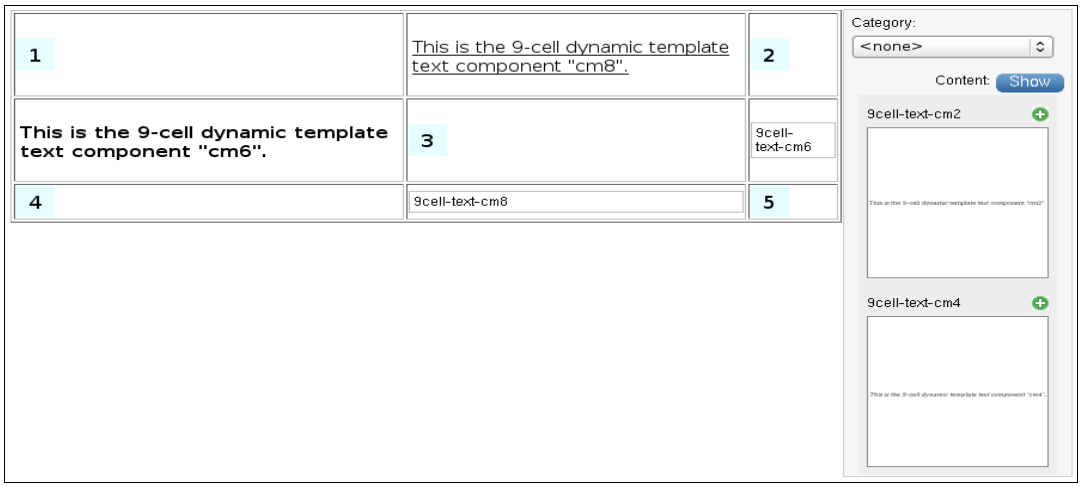
Let's assume for this demonstration that we wish to re-insert the “deleted” blocks in reverse order of the “block name/number”. The key here is that the actions must be done in the proper sequence if this is going to be the only method to rearrange them. One can always move the blocks “in situ” once they are all re-inserted, but that is more steps than necessary for this demonstration and can lead to great confusion and frustration.

The order chosen for re-insertion has to go in the reverse order as the block/name order (“cm8”, “cm6”, “cm4”, “cm2”). This will put “cm8” in the “cm2” text block location when we are done.

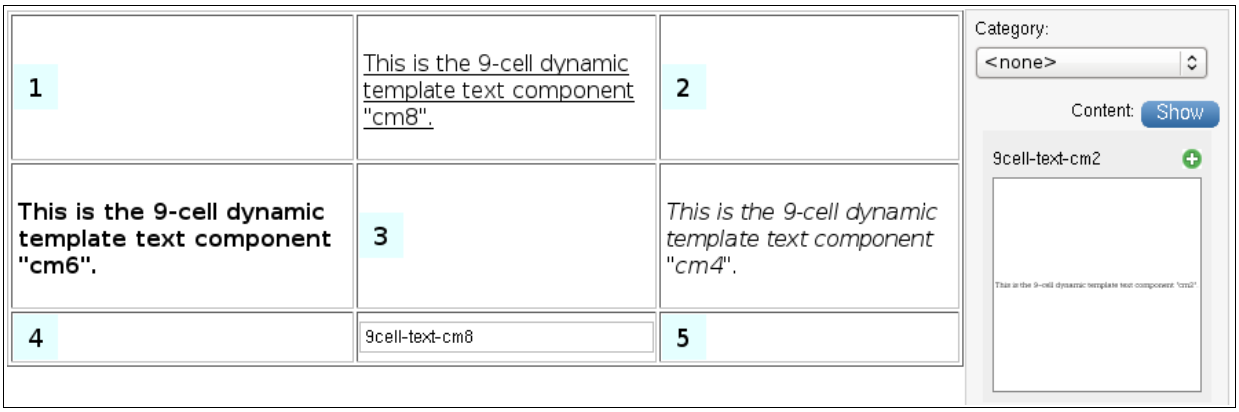
Move “cm8” first:



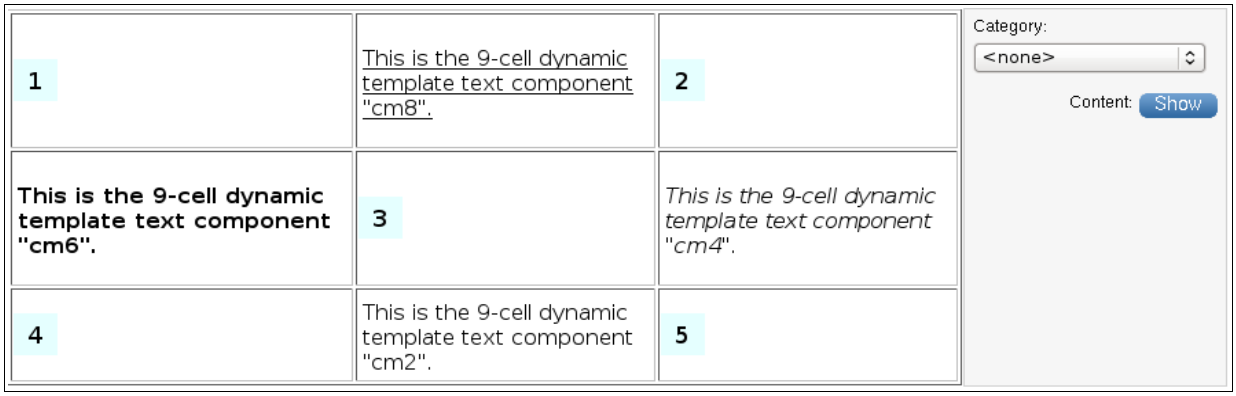
Then “cm6”:



Then “cm4”:



Then “cm2”:



Final Comments

Simple examples have been used to help illustrate how OpenEMM dynamic templates and content can be used. It should be obvious that there is nearly an unlimited number of ways that these components can be combined, and altered, to produce much more complex (or even simpler) content presentation. As each text content module can be used in an indefinite number of mailings, this exponentiates the possibilities.

Naming content fields/blocks helps to organize, and perhaps, visualize a desired content “layout” but it should be readily apparent that dynamic templates and content aren't bound by any “rules of order”. Nevertheless, it will be easier to accomplish a desired goal if content blocks can be assigned in an order that will place them in the desired template positions without requiring any further placement manipulations.